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#### 2.101 (Rev. 08/95)

#### LINE 8/9 ITEMS - INFORMATION

## GENERAL INFORMATION

Lines 8 and 9 items are reserved for information required for specific transactions or to clarify other items on the PAR. Section 3 of the PAM on Required/Conditional charts gives the 8/9 items that may be needed for the transaction being documented. The actual entry required on line 8/9 is outlined in the item definition section.

#### DOCUMENTATION

For entries on line 8/9, the three digit item number is written to the left side of the broken vertical line. The codes, dates, etc., are placed to the right of the broken vertical line.

When multiple codes, dates, etc. are required for one item, use dashes to separate them. Always enter six digits for dates with appropriate slashes.

The total length of characters to be entered is stated in each item. This count includes alpha or numeric only and does not include dashes, slashes, colon, semicolon, decimals, commas, etc...

Entries on line 8 or 9 need not be in numeric order. They can be entered in any order within one line. Pre-coded boxes (e.g. 805, 810, 905, 910, etc.) hold no value and should be disregarded. Items in the 900 number series must be entered on Line 9 only.

## ADDITIONAL INFORMATION

The shaded area of Line 8/9 is used for turnaround purposes. The following 8/9 items will turnaround in the shaded area:

857 - Emergency Qualifying Time

871 - Right of Return Designation

876 - Anniversary Date - Second Accelerated

884 - License - Additional (maximum of 3 entries)

886 - Class Title Variation Code

955 - Multiple Hourly Rate (maximum of 4 entries)

(continued on next page)



#### 2.101.1 (Rev. 08/95)

#### LINE 8/9 ITEMS - INFORMATION (cont.)

ADDITIONAL INFORMATION (cont.)

Lines 8/9 items are applied in the same manner for additions, deletions or changes as explained on PAM pages 3.0 and 3.2. For additional information on corrections to Line 8/9 items see Section 9 of the PAM.

Some Required/Conditional charts have "delete only" printed after certain 8/9 titles. This means an 8/9 item showing in the shaded area of the turnaround PAR may be deleted while initiating a transaction if it no longer applies to the employee's present status. To delete an 8/9 item, enter the item number and \*EOF.

**EXAMPLE:** 

*****				
0	- 7			
то: 3	12/	* EO	1	İ

To delete a code from an item when more than one entry is allowable, enter the item number and code(s) which still apply and enter the item number and \*EOF for code(s) which no longer apply.

FROM	884	1-04/10/95	884	4-03/01/95	
}	0.7.11				
то:	884	1-04/10/95	884	X = 0F	
	805	i	BIC	i	815

#### ITEM 850 - ADDITIONAL POSITION SUBSTANTIATION

DESCRIPTION:

A code certifying appropriate attendance for necessary coordination of employee benefits when employee holds an additional position.

REQUIRED:

Upon initial appointment to an additional position.

LENGTH:

10 characters

ENTER:

850: Code (1 digit) - Date (if indicated below)

CODES

DEFINED:

- 1 Employee's additional work assignments and schedule will not conflict with regular assignments and that total sick leave and vacation credits, State service credits, retirement contributions are being coordinated to insure that employee does not exceed full time credit.
- 2 Plus date (mm/dd/yy) (This code used for employees in Work Week Groups 4B and 4D only.) The date approved by SPB analyst and that the total sick leave and vacation credits, State service credits, and retirement contributions are being coordinated to insure that employee does not exceed full time credit.

#### **EXAMPLE:**

9 TO 850 2 - 03/30/83

#### 2.103 (Rev. 11/92)

#### ITEM 851 - ALTERNATE SALARY RANGE CRITERIA

DESCRIPTION:

Indicates the alphabetic or numeric code of the specific alternate range criteria for which employee is qualified. Ranges are based on educational, professional or experience qualifications and also on conditions or location of employment.

REQUIRED:

- 1. If the employee is:
  - a. Changing from one alternate range to another other than to A; or
  - b. Appointed to a different class at an alternate range other than A; or
  - c. Appointed to the same class at the same alternate range (other than A) and work experience is not the basis for the alternate range; or
  - d. Appointed new to data base at an alternate range other than A.
- 2. When an alternate range criteria is added to the employee's classification.

LENGTH:

6 characters

ENTER:

851: 3 digit Alternate Range criteria code as shown in the Civil Service Pay Scales.

	FROM:		1
8		051015	
	то:	851065	810

#### 2.104 (Rev. 02/86)-

#### ITEM 853 - COMMITMENT DATE

DESCRIPTION:

This item is used in order to verify the following situations:

- 1 For employees who qualify under a "hire above minimum" rate but who do not fall under HAM delegation to the departments, a letter of authorization must be obtained from SPB or Finance. If a commitment is made before the expiration date of the letter but effective date of appointment is after the expiration date, this item must indicate the date commitment was made.
- 2 The commitment date must be indicated when effective date of appointment is after the expiration date of the certification from which eligible was appointed.
- 3 The commitment date must be indicated when commitment was made prior to receipt of supplemental names on an updated certification.

REQUIRED:

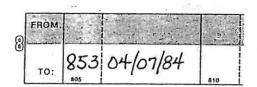
For AO1 or AO2 Transactions where above situations apply.

LENGTH:

9 characters

ENTER:

853: Date (mm/dd/yy)



#### 2.105 (Rev. 05/90)

#### ITEM 856 - DEMOTION REASON

DESCRIPTION:

Explanation of employee's preference in voluntarily

demoting or choosing a demotion other than that which was

directed (e.g., layoff, reassignment, etc.).

REQUIRED:

For AO2 Transaction (Civil Service eligibility- permissive

when employee is voluntarily demoting).

LENGTH:

5 characters

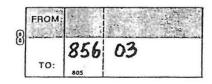
ENTER:

856: Code

CODES DEFINED:

01 - Employee's illness or poor health.

- O2 Change of career. Such as (1) employee development, (2) greater chance for promotion, (3) better utilization of education or training, (4) different field of work.
- 03 Relocation of residence. Such as (1) spouse being transferred, (2) desire to work nearer family, (3) climate change for family health reasons.
- 04 Transportation difficulty. Such as (1) desire to work nearer residence, (2) commuting to another office is easier.
- 05 Conditions of employment. Such as (1) desire for a different shift, (2) less than full-time work, (3) want a field assignment, (4) want an office assignment, (5) want less or no supervisory responsibility, (6) desire a job with less pressure, (7) lost license required to perform in the class.
- .06 To further education or personal development.
- 07 Layoff situation
- 08 Stipulation after appeal.
- 09 Misallocation of position or change in allocation standards.
- 10 In lieu of involuntary transfer.
- 11 Other reason on file with the appointing power.



#### ITEM 857 - EMERGENCY QUALIFYING TIME

DESCRIPTION:

Indicates the total working days accumulated for emergency appointments. This total time must be reported at the end of each emergency appointment. Refer to SPB Rules 300 - 304 for explanation.

REQUIRED:

- For S31 Transaction for separation of emergency employee.
- 2 -For an appointment effective immediately after expiration of an emergency appointment and no separation was documented.
- 3 -When information no longer applies to employee's current status.

LENGTH:

Up to 5 characters

ENTER:

857: ## - Number of Days from 00 to 60\*\* (2 digits); or

\*EOF - Information no longer applies.

ADDITIONAL INFORMATION:

This item will turnaround on the PAR in the Line 8/9 area for future reference. Refer to PAM page 2.101 for additional information.

\*\* When reporting emergency qualifying time for an employee who was appointed to and worked more than 60 day during a true emergency appointment (rule 302.1), complete Items 857 and 215 as indicated in following example.

#### EXAMPLE:

Employee on true emergency appointment (rule 302.1) worked a total of 73 days.

Item 857-

enter "60" ("60" is the most you can enter in this item)

Item 215-

Enter "Emergency/73 days" (Type of emergency must be indicated [PAM 2.36] as well as total number of

emergency days worked.)

ADDITIONAL **EXAMPLES:** 

	FROM:		10
000		857	05
	TO:	108	

FROM:		
	857	60
TO:	tos	

857	05	
857	*EOF	
100		D4

#### 2.108 (Rev. 05/84)

#### ITEM 858 - LIST CLEARANCE DATE

#### DESCRIPTION:

This item indicates the DATE the certification list was cleared when:

- The list clearance was sent to SPB for SPB centralized certification lists; or
- The job referral was received from the SPB job referral system; or
- The delegated certification list was cleared.

REQUIRED:

Appointment Transaction Code AOI (certification process) involving SPB centralized certification lists, SPB job referral system and delegated certification lists when tenure is P, L or T (if name(s) certified on list).

LENGTH:

9 characters

ENTER:

858: Date (mm/dd/yy)

ADDITIONAL

INFORMATION:

This entry is not required for a TAU Appointment when no

names are certified.

	FROM:		X	
3				
	TO:	858	10/12/83	
1	10.	805		810

#### 2.109 (Rev. 11/91)

#### ITEM 859 - FLAG CLEARANCE EMPLOYMENT LIST SUBSTANTIATION

DESCRIPTION:

This signifies that the eligible meets the flag requirements on list clearance and substantiation rests

with the departments subject to audit by Personnel

Operations and SPB.

REQUIRED:

Whenever the flag requirement must be met in order to hire

an eligible from a certification.

LENGTH:

3 characters

ENTER:

859: (no other entry necessary)

#### ITEM 851 - HEALTH AND WELFARE BENEFITS

DESCRIPTION:

Designates Health and Welfare Benefits for an employee in a casual employment class. Refer to DPA Rule 599.691 for more information.

REQUIRED:

For AOI or AO2 Transaction when employee is in a casual employment class.

LENGTH:

4 characters

ENTER:

861: Code (1 digit)

CODES DEFINED:

- 1 If qualified for State Benefits and elects to receive State Benefits must waive payment by State into Health & Welfare Fund and Vacation Fund. (Item 505 must be code "08" or "04".)
- 2 If qualified for State Benefits and elects not to receive State Benefits must elect instead payment by State into Health & Welfare Fund and Vacation Fund or for non-union members - direct payment to employee. (Item 505 must be code "NH" or "NA".)
- 3 If not qualified for State Benefits and if there is payment by State into Health & Welfare Fund and Vacation Fund must accept payment by State into these funds, or for non-union members - direct payment to employee. (Item 505 must be code "NH"or "NA".)
- 4 If qualified for State Benefits and if there is not yet approved payment by State into Health & Welfare Fund and Vacation Fund and elects to receive State Benefits. (Item 505 must be code "08" or "04".)
- 5 If qualified for State Benefits and if there is not yet approved payment by State into Health & Welfare Fund and Vacation Fund and elects not to receive State Benefits. (Item 505 must be code "N" or "NM".)
- 6 If not qualified for State Benefits and if there is not yet approved payment by State into Health & Welfare Fund and Vacation Fund and does not receive any benefits. (Item 505 must be code "N" or "NM".)

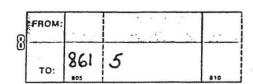
(continued on next page)

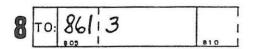
#### 2.110.1 (Rev. 07/83)

#### ITEM 861 - HEALTH AND WELFARE BENEFITS (CONT.)

ADDITIONAL INFORMATION:

The appointing power is responsible for obtaining a signed statement from the employee to indicate the Health & Welfare Benefits employee will receive. Refer to PTM Section 238 for more information.





### ITEM 862 - UNASSIGNED

This item is not to be used at this time.

#### 2.112 (Rev. 02/85)

#### ITEM 863 - INTERMITTENT HOURS WORK EXPECTED

DESCRIPTION:

This is a code indicating the number of hours an

intermittent is expected to work.

REQUIRED:

1) For appointment or change to intermittent time base when tenure (Item 410) is P, T or L; or

EXCEPTION: Not required for mandatory reinstatements when time base or hours are not changing.

2) For 335 Transaction when time base is intermittent and the number of hours expected to work is changing.

LENGTH:

5 characters

ENTER:

863: Code (2 digits)

CODES

DEFINED:

01 - under 25 hours per pay period

02 - 25-50 hours per pay period

03 - 51-86 hours per pay period

04 - 87-100 hours per pay period

05 - 101-125 hours per pay period

06 - 126-150 hours per pay period

07 - average of less than 87 hours per pay period over 6 months

08 - average of 87 or more hours per pay period over 6 months

09 - full time for periods averaging less than 1/2 time over a year

10 - full time for periods averaging 1/2 and 3/4 time over a year

11 - full time certain periods during the year

12 - in excess of full time for certain periods during the year

EXAMPLE:

FROM.

TO: 863 04

0331c13

#### ITEM 864 - LEGAL REFERENCE FOR ANNUITANT

DESCRIPTION:

The Government Code or Education Code which denotes a specific

reference to the law and under which a retired annuitant is legally

appointed.

REQUIRED:

For A01 - A04, A30 - A33 Transactions to appoint a Retired

Annuitant.

LENGTH:

10 characters

ENTER:

864:

Code

CODES

DEFINED:

GC21223\*

Subject to GC19144

GC21224\*

Subject to GC19144

GC21221\*

GC21225\*

GC21228\*

EC23919

EC23921

EC23922

#### EXAMPLE:

	FROM:			
8		864	GC21225	1
_	TO:	805		810

Per Senate Bill 541 (effective 01/01/96) and Senate Bill 1595 (effective 01/01/98) the following Government Codes were renumbered:

From:	To:
21152	21223
21153	21224
21154	21225
21157	21228
21151	21221

#### ITEM 865 - MILITARY SUBSTANTIATION

DESCRIPTION:

The total length of active duty when an employee is given a military leave of absence and when mandatorily reinstating an employee after a resignation to join military service (G.C. 19783). This information is required for verification of reinstatement eligibility at the time of return to State service. Length of active duty is obtained from the military orders. See PTM Section 471 for computation.

REQUIRED:

For the following transactions:

S51 - Military - Short Term S52 - Military - Long Term S53 - Military - Emergency

A03 - Mandatory Reinstatement (when employee has mandatory rights after resigning to join military service per G.C. 19783)

LENGTH:

7 characters

ENTER:

 $\frac{865}{}$ : # years (1 digit) - ## months (2 digits) - # tenths of months (T digit)

ENTRIES

DEFINED:

Tenths of months - formula for partial months is 3 calendar days equals 1/10 of a month. Divide 3 into number of days to find tenths of months.

EXAMPLE A: 23 days = 
$$3/\frac{7}{23}$$
 = 8/10  $\frac{21}{2}$ 

EXAMPLE B: 22 days = 
$$3/\overline{22} = 7/10$$

**EXAMPLE:** 

\*\*This is an example of 3 years 6 mos.

### 2.115 (Rev. 05/11)

#### ITEM 866 - LEAVE OF ABSENCE SUBSTANTIATION, SPECIAL

**DESCRIPTION**: Denotes substantiation to the Special Leave authorized for a Veteran's Education or Job Incurred Illness or Injury.

#### REQUIRED:

- 1 For S55 Transaction Veteran's Education Leave of Absence. This leave requires the following:
  - Date Form 718 was given to employee.
  - Number of years, months and/or days of school (total entitlement) up to a maximum of 4 years, 3 months as specified in G.C. Section 19341.
  - · Date of enrollment in school and the length of school year.

For an extension of this type of leave, a memo stating the reason must be attached to the PAR.

For computing the expiration date or length of the leave see PTM Section 500.

- 2 For S56 Transaction Special Leave of Absence due to Job Incurred Illness or Injury. This leave requires either:
  - Date of last paid temporary disability day. (to be used when the employee exhausts the maximum temporary disability benefit but has not been declared permanent and statuary nor returned to work)
  - Date of Permanent Disability Award; or
  - Date employee started rehabilitation training.

The effective date of the leave cannot be earlier than the date mentioned above.

LENGTH: Up to 23 characters

#### ENTER:

866: Code - mm/dd/yy - y/mm/dd - mm/dd/yy - ##; or

Code - mm/dd/yy

If entry will exceed 18 characters, including item number, make entry in Line 9.

CODES DEFINED: Entries for Veteran's Education Leave of Absence

Code A - plus the following:

mm/dd/yy - date Form 718 was given to employee.

<u>y/mm/dd</u> - number of years, months and/or days of school enrollment.

(continued on next page)

## 2.116 (Rev. 08/12)

#### **TEM 866 - LEAVE OF ABSENCE SUBSTANTIATION, SPECIAL (cont.)**

#### **CODES DEFINED** (Cont.):

mm/dd/yy - date of enrollment.

## - length of school year in terms of months.

Code D - Extension of Leave of Absence.

Attach a memo to the PAR stating the reason for extension of leave. Line 10 - Remarks, should have appropriate box checked "Substantiation Attached".

#### Entries for Special Leave of Absence due to Job Incurred Illness or Injury

Code  $\underline{E}$  -  $(\underline{mm/dd/yy})$  - Date of permanent disability award.

Code <u>F</u> - (<u>mm/dd/yy</u>) - Date employee begins rehabilitation training, or last paid date of temporary disability.

#### **EXAMPLE**:

Veteran's Educational Leave of Absence

9	FROM:			
	TO:	866	A-09/01/80 — 4/03/01- 09/15/80-09	
		905		910

#### Extension of Veteran's Leave of Absence

8	FROM:			
	TO:	866	D	
		805		910

Special Leave of Absence due to Job Incurred Injury or Illness

<u>.                                    </u>	<del>ca nija</del>	ry or minoss	
	<b>866</b> 815	E-05/15/83	920

#### 2.117 (Rev. 11/86)

#### ITEM 867 - LIMITED-TERM / ANNIVERSARY DATE JUSTIFICATION

#### DESCRIPTION: Indicates the:

- reason for an LT (or TAU in lieu of LT) appointment, except for classes in which only LT appointments are made.
- SISA/MSA justification for a temporary employee.

Refer to DPA Regulation 599.682 and PTM Section 711.

#### REQUIRED:

1) FOR APPOINTMENT JUSTIFICATION when appointment is LT (or TAU in lieu of LT), or consecutive LT (or TAU in lieu of LT).

DOES NOT INCLUDE: Non-testing LT only classes or LT/TAU appointment due to SPB decision or court order.

- 2) FOR ANNIVERSARY DATE JUSTIFICATION of service under the following appointment conditions:
  - Seasonal non-testing class
  - Non-testing entry level training class in lieu of permanent appointment
  - LT (or TAU in lieu of LT) when filling a permanent position
- or when an anniversary date was not established on the appointment transaction to justify counting service towards a SISA/MSA in a seasonal non-testing; or non-testing entry level class in lieu of permanent appointment; or LT (or TAU in lieu of LT) when filling a permanent position.

LENGTH:

Up to 10 characters

ENTER:

867: Code (1 digit) - Date (mm/dd/yy). (Use date for codes 5 and 8 only.)

CODES

DEFINED:

- 1 Filling permanent position while employee is on sick leave, vacation, Leave of Absence, Limited-Term TAU Appointment, or Training and Development Assignment. (Service DOES count towards SISA/MSA.)
- 2 Filling seasonal workload job, or non-testing entry level training class in lieu of permanent appointment. (Service DOES count towards SISA/MSA.)
- 3 Filling a short-term budgeted position. (Service DOES NOT count towards SISA/MSA.)

0331c18

(continued on next page)

#### 2.117.1 (Rev. 11/90)

#### ITEM 867 - LIMITED TERM / ANNIVERSARY DATE JUSTIFICATION (CONT.)

# CODES DEFINED: (Cont.)

- 4 Filling a job for a short-term pending reorganization or reduction in force. Service DOES NOT count towards SISA/MSA.
- 5 Plus date (mm/dd/yy) department extends LT appointment OR approves consecutive LT appointment AND service DOES count towards SISA/MSA.
- 6 Filling a project status job. Service DOES NOT count towards SISA/MSA.
- 7 Other reason (must be on file) AND service DOES NOT count towards SISA/MSA.
- 8 Plus date (mm/dd/yy) department extends LT appointment OR approves consecutive LT appointment AND service DOES NOT count towards SISA/MSA.
- 9 Other reason (must be on file) AND service DOES count towards SISA/MSA.

FROM:		
то:	867 8-07/06/90	1

#### 2.118 (Rev. 08/94)

#### ITEM 869 - REEMPLOYMENT LIST ELIGIBILITY DATE

DESCRIPTION:

This item identifies the effective date of reemployment list eligibility for the class in Item 725.

Also included in this item is the salary range number for the level at which seniority would have provided a job. (If not applicable use date only.)

If effective date of the transaction is:

03/01/89 or later - ENTER DATE only

Prior to 03/01/89 - ENTER SALARY RANGE NUMBER and DATE

REQUIRED:

- When reemployment list eligibility is granted and reporting one of:
  - a. Transfer, demotion, or separation of civil service employee; or
  - b. A30-A35 Transactions for a current employee;

OR

2. When the above action was documented prior to the effective date of layoff. (In this case, submit a corrected transaction when the layoff goes into effect.)

LENGTH:

13 characters

ENTER:

869: Salary Range (##.#) - Date (mm/dd/yy).

Use the salary range number and a date if the transaction is prior to 03/01/89.

OR

869: Date (mm/dd/yy)

Use Date only if the transaction is effective 03/01/89 or

later.

ADDITIONAL

INFORMATION: The Reemployment List Eligibility Date will print in Line 12 - Employment History, along with the class code and type of

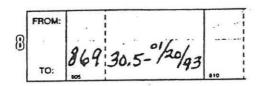
reemployment list eligibility.

#### 2.118.1 (Rev. 08/94)

### ITEM 869 - REEMPLOYMENT LIST ELIGIBILITY DATE

EXAMPLE:

(Prior to 03/01/89 - conversion to Universal Salary Structure)



(03/01/89 or later - after conversion to Universal Salary Structure)

1	FROM:	:	
اه		į	
·35		869 01/20/93	
	TO:	00 1 01/20/19	

#### 2.119 (Rev. 03/99)

#### ITEM 871 - RIGHT OF RETURN DESIGNATION

#### DESCRIPTION:

Indicates the circumstances of an employee's mandatory right of return. That is, if he/she meets/does not meet the definition of a "permanent employee" (GC 18528) and therefore has/does not have a mandatory right of return following another appointment or temporary separation and the length of such right. This item, which must agree with employment history and the entry made in the Item 430, must be considered for employees being reinstated or separated under certain conditions and also for employees with consecutive exempt appointments. For additional information, see GC 19141, PAM Section 2.56 and PMPPM Sections 312, 313 and 314.

#### REQUIRED:

- 1 For employee who has either permanent or probationary civil service status when:
  - A) Accepting another civil service appointment without a break in service for:
    - Tenure L, T, C, or E; or
    - Tenure P and accepting a Training & Development Assignment; or
    - Tenure P and shaded area or entry made by the department is other than Code "N" in Item 430.

#### **EXCEPTION:**

Not required when Change in Time Base is the ONLY change documented by Certification Process and employee has not completed probationary period.

- B) Appointment is not based on the employee's mandatory reinstatement rights which were gained previously.
- C) Mandatorily reinstating after a temporary separation and employee retains right of return to a prior class, or to another state agency.
- D) Temporarily separating (S51 or S53 Transactions only).
- Separating and employee does not wish to exercise his/her right of return.
- F) Accepting an exempt appointment without a break in service (A30 A35 Transactions).
- G) Separating to accept CSU exempt appointment; or, appointment or employment by the Legislature (House or Legislative Committees) (S05 Transaction).
- 2 When information in shaded area no longer applies.

(continued on next page)

#### 2.120 (Rev. 03/99)

#### ITEM 871 - RIGHT OF RETURN DESIGNATION (cont.)

LENGTH:

Up to 7 characters

ENTER:

871: Code (2 digits)

CODES DEFINED:

- 01 has indefinite right of return from appointment effective date when accepting exempt appointment.
- 02 has four year right of return from appointment effective date when accepting exempt appointment.
- 03 has six month right of return from appointment effective date when accepting exempt appointment.
- 04 does <u>not</u> have a right of return this may include but is not limited to (refer to PMPPM Sections 312, 313 and 314):
  - employee accepting an exempt or civil service appointment and does <u>not</u> have permanent status; or
  - b. employee's probationary period is waived.
- 05 has right of return upon expiration date of temporary separation providing conditions of temporary separation are met.
- 06 has right of return upon rejection during probationary period only.
- 07 has right of return but does not wish to exercise it.
- 08 did not request right of return within legal time limit.
- 09 has right of return upon termination/expiration of appointment.
- \*EOF information no longer applies to employee's current status.
  - (i.e.: when 430 transaction is posted for intermittent, indeterminate or fractional time base employee who completes probationary period (Item 430 = 6).

(continued on next page)

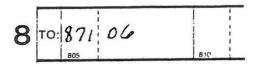
#### 2.120.1 (Rev. 08/95)

#### ITEM 871 - RIGHT OF RETURN DESIGNATION (CONT.)

## ADDITIONAL INFORMATION:

This item will turnaround on the PAR in the Line 8/9 area for future reference. Refer to PAM page 2.101 for additional information.

An appropriate statement will print on the NOPA issued as a result of reporting this Line 8/9 item on the PAR, except for exempt appointments.



		•
871	06	-
871	*EOF	
815 1		820

#### 2.121 (Rev. 05/86)

#### ITEM 872 - SALARY INCREASE CERTIFICATION

DESCRIPTION:

This item is used to indicate:

- . approval or denial of SISA . approval or denial of MSA, or
- . denial of SISA/MSA for lump sum only.

REQUIRED:

- For Appointment Transaction when granting a SIS/MSA effective with that transaction; or
- 2) For SIS/MSA Transaction; or
- 3) For Separation Transaction requesting or denying lump sum payment at SIS/MSA rate (see Item 962).

LENGTH:

Up to 10 characters

ENTER:

872: Code - Date (mm/dd/yy) (Use date with Code 2 only).

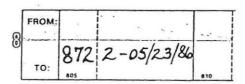
CODE DEFINED:

- 1 Supervisor Certification of Salary Adjustment (PSD or STD 609) completed and approved. On file in the Department.
- 2 plus a date when SIS/MSA has been approved through the grievance procedure, enter date the grievance was filed.
- 3 SIS/MSA denied.
- 4 SIS/MSA denied for lump sum only.

ADDITIONAL INFORMATION:

If correcting a MSA or SIS Transaction when approval or denial was reported in error, a copy of the signed F609 must be on file with the appointing power. (See PAM Line 10 - Completion Charts.)

See PTM Sections 133.8 - 133.81 for Lump Sum payment at SISA rate.



#### 2.122 (Rev. 11/94)

#### ITEM 873 - SALARY RATE SUBSTANTIATION, ABOVE MINIMUM

DESCRIPTION: This item designates the basis for hiring an eligible above the

minimum salary rate for the class.

REQUIRED:

1. For AO1, AO2, A03, A11, A20, A21, or A32 Transaction when hiring above the minimum in the base salary; OR

2. For any transaction that adds or changes a plus salary for a

civil service or Maritime Academy employee.

LENGTH:

4 characters

ENTER:

873: Code

CODES

DEFINED:

- 1 HAM approved for individual employee by DPA memorandum (on file with department).
- 2 HAM approved for specific class by DPA memorandum and is included in the base salary (Item 320).
- Exempt roster card on file with department; or counting exempt time shown in Employment History.
- 4 HAM approved by Department under authority delegated by SPB/DPA memorandum (on file with Department).
- 5 HAM approved for specific class by DPA memorandum <u>and</u> is shown as a plus salary (Item 325).
- 6 Red Circle Rate:
  - a. Approved by DPA memorandum (on file with department).
  - b. Approved for 90 days upon termination of CEA assignment.

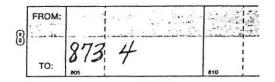
(continued on next page)

#### 2.122.1 (Rev. 11/94)

#### ITEM 873 - SALARY RATE SUBSTANTIATION, ABOVE MINIMUM (CONT.)

7 - Appointment rate based on employee's combined salary of based on salary rate <u>plus</u> pay differential rate of prior class per the pay differential criteria authorized by DPA; <u>OR</u>

Plus salary for a Limited Examination and Appointment Program (LEAP) employee (class code 4687) who is eligible for a premium pay based on the parenthetical class in which the duties are performed. Refer to pages 2.36 and 2.43 for additional documentation instructions.



#### 2.123 (Rev. 08/91)

#### ITEM 874 - ADVERSE ACTION AND REJECTION SUBSTANTIATION

DESCRIPTION:

Indicates by means of a code that;

1) a Notice of Rejection During Probationary Period and a

Declaration of Service; or

2) a Notice of Adverse Action and Declaration of Service have been sent to the State Personnel Board when such action is taken against an employee according to

instructions in the Personnel Management Policy and

Procedures Manual (PMPPM) Section 400.

REQUIRED:

For the following transactions:

Al4 - Adverse Demotion (class/alternate range change of

deep class)

PUN - Adverse Salary Decrease

S41 - Dismissal

S85 - Adverse Suspension

S90 - Rejection During Probationary Period

ORP - Official Reprimand\*

LENGTH:

10 characters

ENTER:

874: Code (1 digit) - Date (mm/dd/yy)

CODES

DEFINED:

1 - plus a date - indicates date a Notice of Rejection

During Probationary Period and

Declaration of Service were sent to SPB.

2 - plus a date - indicates date a Notice of Adverse

Action and Declaration of Service were

sent to SPB.

ADDITIONAL

INFORMATION:

See PAM Section 5 for Decision of State Personnel Board

After Appeal.

0	FROM:			est.
A	то:	874 1 - 12/01/83	910	

<sup>\*</sup> ORPs not to be entered on EHDB.

#### 2.124 (Rev. 08/95)

#### ITEM 876 - ANNIVERSARY DATE - SECOND ACCELERATED

#### Identifies either: DESCRIPTION:

- The second accelerated anniversary due a civil service employee when movement to the minimum step in a SISA class resulted in a salary increase of less than one step; or
- The third step anniversary date for an exempt employee in the class of Corpsmember, CCC (Class Code 8888).

#### REQUIRED:

For the following transactions when information is blank or changing, or no longer applies:

- 1) For AO1, A11 and A20 - A22 Transactions when civil service employee is due a second accelerated anniversary date; or
- 2) For A35 Transaction for Corpsmember, CCC (Class Code 8888) when appointed at minimum salary; or
- When information is changing or no longer applies. 3)

LENGTH:

Up to 7 characters

ENTER:

876: Pay Period

(mm/yy) of second accelerated anniversary date for civil service employee; or

(mm/yy) of the third step anniversary date for Corpsmember, CCC; or

\*EOF -

information no longer applies to employee's current status.

#### 2.124.1 (Rev. 08/95)

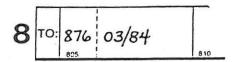
### ITEM 876 - ANNIVERSARY DATE - SECOND ACCELERATED

#### ADDITIONAL

INFORMATION: This item will turnaround on the PAR in the Line 8/9 area for

future reference. Refer to PAM page 2.101 for additional

information.



876	03/841	4.
876	*EOF	
815		820

# ITEM 877- LUMP SUM PAYMENT DEFERRAL (NEW 09/03)

DESCRIPTION: This item indicates deferral of payment of lump sum vacation, personal leave, holiday leave, overtime and/or sick leave (subject to G. C. 19991.4) until the following calendar year. Only the portion of lump sum separation pay that extends past the November pay period can be deferred. The deferred earnings would then be reported on Form W-2 issued for the next tax year.

REQUIRED: When a separating employee requests/elects to have her/his lump sum payment that extends past the November pay period issued in the following calendar year (see below for additional information).

ENTER: 877: (no other entry necessary)

#### ADDITIONAL INFORMATION:

71

Employees separation under Labor Code Section 201 or 202 must submit a written election five days before her/his final day of employment authorizing the deferral.

Refer to PAM Section 5.76 for lump sum payment deferral documentation instructions.

FROM:	F		
	877		
TO:	01,1		

#### 2.126 (Rev. 05/86)

#### ITEM 878 - TEMPORARY AUTHORIZATION CLEARANCE

DESCRIPTION:

This item certifies that an application for TAU approval has been approved in advance of initiating the PAR for the TAU appointment. SPB form 100-215 should be used if SPB approval is required and it should be returned from SPB with approval prior to initiating an appointment transaction.

For all TAU Appoinment Transactions.

LENGTH:

REQUIRED:

4 characters

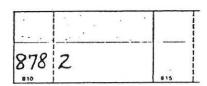
ENTER:

878: Code (1 digit)

CODES

DEFINED:

- 1 SPB clearance for TAU, MQ approved by SPB.
- SPB clearance for TAU,
   MQ approved by department.
   (This includes delegated testing.)
- 3 SPB clearance for TAU, Application on file. (For appointees who have an approved application on file with SPB but the examination has not yet been given or is not completed.)
- 4 SPB clearance for TAU, MQ approved by SPB for a "Rule 265" appointment (see Laws and Rules).
- 5 SPB clearance for TAU, MQ approved by department for a "Rule 265" appointment.
- 6 SPB clearance for TAU, Application on file for "Rule 265" appointment.



#### 2.127 (Rev. 11/35)

#### ITEM 879 - TIME BASE SUBSTANTIATION

DESCRIPTION:

This item indicates the type of eligibility employee has (refer to SPB Rule 277) to be appointed on a full time basis.

REQUIRED:

For Appointment and Miscellaneous Change Transactions when employee is increasing time base to full time.

This excludes:

- Changes accomplished by the certification process.
- Employees with prior full time permanent or probationary status in this class or in a class with same or higher salary level.

LENGTH:

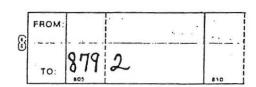
4 characters

ENTER:

379: Code

CODES DEFINED:

- 1 Appointing power can clearly demonstrate employee has previously been eligible for appointment from an employment list to this position at full-time.
- 2 Employee has held any combination of permanent or probationary appointments in this class or in class(es) at same or higher salary level AND has worked at least 1920 hours in such appointments for at least 2 years.



#### 2.128 (Rev. 02/85)

#### ITEM 880 - TIME OF DEATH

DESCRIPTION:

Time of death followed by a code to indicate whether employee is entitled to full, partial or no payment for day of death. (Payment for day of death is determined by the employee's status at the time of death. Refer to PTM

Section 590.)

REQUIRED:

S95 (Death) Transaction

LENGTH:

8 characters

ENTER:

TIME OF DEATH (2 digits, colon, 2 digits) - CODE

(Y/N)

Time of death must be reported based on 24 hour clock as indicated on the chart below:

#### CLOCK CHART

Time of death unknown - 00:00 Midnight + one minute - 50:01 8 O'Clock A.M. - 08:00 12 O'Clock Noon - 12:00 4 0'Clock P.M. - 16:00 8 O'Clock P.M. - 20:00 12 O'Clock Midnight - 24:00

CODES DEFINED:

Code Y designates:

- Day of death was a normal workday for employee who was on paid leave status at time of death or on paid leave status the day prior to the death and is entitled to pay for full day; or
- Day of death was a holiday for employee and is entitled to pay for full day; or
- Employee died after completing regular work shift and is entitled to pay for full day.

Code N designates:

- Day of death was a normal workday for employee who died while on the job and is entitled to payment up to time of death only; or
- Employee died on day off or before regular working hours and is not entitled to pay on day of death; or
- Employee on Leave of Absence at time of death.

EXAMPLE:

FROM 880 16:05 -Y TO:

0331c31

### 2.129 (Rev. 05/88)

#### ITEM 881 - UNASSIGNED

This item is not to be used at this time.

### 2.130 (Rev. 11/07)

### **ITEM 884 - LICENSE - ADDITIONAL**

**DESCRIPTION**: Identifies in addition to Item 560, the type of license, credential or

certificate and the expiration date (if any) required to continue

employment in the class.

**REQUIRED**: When this item is allowable, it may be completed on any

transaction when information is blank or changing, or no longer

applies.

**LENGTH**: Up to 10 characters (per entry)

ENTER: 884: Code (I digit) - Date (mm/dd/yy) (Leave date blank if no

expiration date).

CODES

**DEFINED**: 1 - Plus expiration date of Driver's License.

Plus expiration date of Consumer Affairs License.

Plus expiration date of Credential for Teacher.

Plus expiration date of Other, etc.

\*EOF - Information no longer applies to employee's current

status.

NOTE: One entry will delete information in all three fields.

**ADDITIONAL** 

INFORMATION: This item will turnaround on the PAR in the Line 8/9 area for

future reference. Refer to PAM page 2.101 for additional

information.

**EXAMPLE:** 

		<u> </u>	T
8 TO:	884	2 - 03/01/95	
	805		810

8	FROM:	884	2 03/01/95	
	TO:	884	*EOF	
		805		810

NOTE: All fields must be completed whenever a change is made to any field. Otherwise existing information will be deleted.

## 2.131 (Rev. 08/95)

### ITEM 886 - CLASS TITLE VARIATION CODE

**DESCRIPTION**: Identifies any class title that contains the words "various studies". "various specialties" or "various projects". There must be a designation by means of a code to identify the actual study, specialty or project undertaken. Employees in these various studies and various projects acquire status only in the project to which appointed. This item also identifies employees appointed under the Welfare Reform Program (WRP) and appointments made with Title II funds. Positions funded by WRP include WIN/COD, COD/Rehab. or COD.

REQUIRED:

For the following transactions when information is blank or changing:

- 1 For appointment or movement to a class with the above phrase included in the class title.
- 2 For appointments of applicants to the Welfare Reform Program.
- 3 For Title II Casual Employees.
- 4 When DPA has approved a Title II project as exempt from the 6/7/78 hiring freeze.
- 5 When information no longer applies to employee's current status.

LENGTH:

Up to 6 characters

ENTER:

886: Code (3 digits)

CODES

DEFINED:

996 - Schedule A, federally funded position in the Department of

Forestry.

997 - Title II fund appointee.

999 - Welfare Reform Program appointee.

TITLE CODE - Class title variation code listed in Appendix I.

\*EOF - Information no longer applies to employees current status.

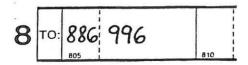
# 2.131.1 (Rev. 08/95)

# ITEM 886 - CLASS TITLE VARIATION CODE

# ADDITIONAL

INFORMATION: For 120 Transaction, this item is allowable <u>only</u> for Welfare Reform Program (Code 999).

This item will turnaround on the PAR in Line 8/9 area for future reference. Refer to PAM page 2.101 for additional information.



194		adig.
886	996	A
886	*EOF	830

2.1	132	(Rev.	10/82)
			,0,00,

# ITEM 887 - MULTIPLE FUNDED POSITION

This item is not to be used at this time.

## 2.133 (Rev. 11/91)

### ITEM 888 - SICK LEAVE AT RETIREMENT

DESCRIPTION:

Provides employee retirement credit for any unused sick

leave upon retiring from State service.

REQUIRED:

For a S70 or S71 Transaction.

LENGTH:

7 characters

ENTER:

888: Number of hours (4 digits\*) or

0000 (if no hours)

Use leading zeros when hours are zero\* or less than 4

digits.

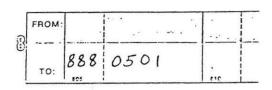
ADDITIONAL INFORMATION:

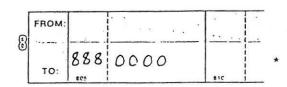
Employees are allowed credit for fractional hours. However, these hours must be reported directly to PERS, Post Retirement Services (e.g. fractional time base employee having 45.8 hours sick leave, enter 0045 and

report correct number of hours to PERS).

On the S71 transaction, if lump sum payment of sick leave is requested (item 620 sick leave is completed), item 888

must be 0000.





# ITEM 889 - PROBATIONARY PERIOD END DATE HOURS

This item is not to be used at this time.

# 2.135 (Rev. 05/77)

### ITEM 890 - EMPLOYMENT DURING LEAVE OF ABSENCE CLEARANCE

DESCRIPTION:

A civil service or SPB Exempt employee who is appointed to an additional position while on a leave of absence, must still meet the criteria for which the leave of absence was granted. Use of this line 8/9 item verifies that employee continues to meet this criteria and also that this

continues to meet this criteria and also that this appointment is not a reinstatement from such leave.

REQUIRED:

For AO1, AO2 or A32 Appointment Transaction to an additional position while employee is on a leave of

absence.

LENGTH:

3 characters

ENTER:

890: (no other entry necessary)

ADDITIONAL

INFORMATION:

Refer to page 5.10 in PAM for Additional Position

Documentation.

1	FROM:	1					1
3			ļ	<b></b>	 	••••	<u> </u>
1		890	f t		1		1
1	TO:	805	i			810	1

2	136	(Rev.	05	1771
L .	100	ILEA.	03/	111

### ITEM 891 - INDETERMINATE SERVICE ACCUMULATION

DESCRIPTION:

Indicates if State service for a civil service or exempt employee with indeterminate time base is accumulated on a part-time or indeterminate basis.

REQUIRED:

- 1. For AOI-AO4, AIO-A33 or A35 Transactions, when an employee is appointed with indeterminate time base.
- For 405 Transaction when an employee's time base is changing to indeterminate from another time base.

LENGTH:

7 characters

ENTER:

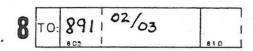
891: plus actual part-time fraction when service is accumulated on a part-time basis; or

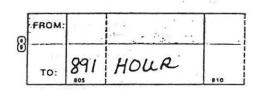
HOUR when service is accumulated on an hourly or daily basis; or

FT for employee in the class of Professional Intern (Class Code 8320).

ADDITIONAL INFORMATION:

The time base information required to complete this item is obtained from the contract.





# 2.137 (Rev. 08/88)

### ITEM 892 - LAST DAY ON PAY STATUS

DESCRIPTION:

Designates the last day on pay status for a civil service or exempt employee.

REQUIRED:

1) For any appointment transaction when there is a change in appointing power.

NOTE: A "change in appointing power" includes different department or different division having authority as an appointing power, such as an institution or special school.

- 2) When a temporary appointment expires two or more days prior to the new appointment being intitiated; or
- 3) For S49 Transaction.

LENGTH:

9 characters

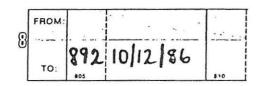
ENTER:

892: Date (mm/dd/yy)

- For an employee with a time base of FULL TIME or PART TIME, enter the last day physically worked or on paid leave.
- . For an employee with a time base of INTERMITTENT or INDETERMINATE, enter the day immediately preceding the transaction effective date.

# **EXCEPTIONS:**

- When documenting an S49 Transaction for INTERMITTENT or INDETERMINATE employee AND employee receives regular pay for effective date of transaction, enter transaction effective date.
  - When temporary appointment for INTERMITTENT or INDETERMINATE employee expires two or more days prior to new appointment effective date, enter expiration date of temporary appointment.



### 2.138 (Rev. 06/85)

# ITEM 895 - ACADEMIC DAYS NOT WORKED

DESCRIPTION:

Identifies the number of academic days not worked in the pay period when a ten month academic employee is appointed effective after the first work day of the pay period. For further clarification see DPA Regulation 599.667.

REQUIRED:

- For AO1-AO3, A10-A22 Transactions when employee appointed under Alternate Salary Range #47 (Range F).
- 2. For A30 Transactions for exempt academic employees of special schools in the Department of Education when they are appointed after the first working day of the pay period.

LENGTH:

5 characters

ENTER:

 $\frac{895}{}$ :  $\frac{\#\#}{}$  of academic days not worked in the academic pay period of appointment (use numbers 01 through 21).

	FROM:			6 A . 10
8		895	20	
1	TO:	805		810

### ITEM 950 - APPOINTMENT REORGANIZTION SUBSTANTIATION

DESCRIPTION: Gives the authority on which the reorganization and transfer of employees

is based. Only statutorily approved actions can result in programs and

functions being reorganized. An Administrative Order must have

legislative concurrence on a post-approval basis. The official employee

record and transaction must reflect this.

REQUIRED:

For Appointment Transaction A13.

LENGTH:

Up to 17 characters

ENTER:

950: and the appropriate information below:

Code 1 - mm/dd/yy (date of Governor's Administrative Order)

Code 2 - 000 (3 numeric zeros) plus Budget Item Number as follows:

- Organization Code (4 digits)
- Reference Code (3 digits)
- Fund Code (3 digits)

Code 3 - mm/dd/yy (date agency reorganization authorization letter received from DPA)

For Legislative approval of Senate Bill or Assembly Bill:

Code 4 - "AB" or "SB" plus 4 digits1

- Chapter No. (4 digits\*)
- Year (2 digits)

For special emergency session called by the Governor:

Code 4 - "AB" or "SB" plus 4 digits<sup>1</sup>

- <u>9999</u> (4 digits)
- Year (2 digits)

<sup>1</sup> NOTE:

If bill number is less than 4 digits, use X's after bill

number.

NOTE:

If chapter number is less than 4 digits, use leading zeros.

# ITEM 950 - APPOINTMENT REORGANIZTION SUBSTANTIATION (CONT.)

9	FROM:			
	TO:	950	1-12/01/00	
	10.	905		910

0	FROM:			
	TO:	950	2-000-9898-001-999	
	10.	905		910

2	FROM:			
	TO:	950	4-AB25XX-0525-00	
		905		910

9	FROM:			
	TO:	950	4-AB79XX-9999-80	
		905		910

### 2.140 (Rev. 03/75)

# ITEM 951 - APPOINTMENT RESTRICTION - SPECIFIC SEX

DESCRIPTION:

Designates reason for restriction of an appointment to one sex or the other depending upon duties of the position.

REQUIRED:

For Appointment Transaction Code AOI and when certification is male only or female only.

LENGTH:

Up to 11 characters

ENTER:

951: Code - Date (if indicated below)

CODES

DEFINED:

- 01 Work in which a male's right to privacy would be violated by the presence of a female.
- O2 Case work in which the treatment needs of those being served require a male caseworker, or positions in an institution where employment of a female would result in antisocial or violent behavior by the patients, wards, or inmates.
- 03 Law enforcement positions in which employment of males only is shown to be essential in order to maintain public confidence in the ability of the agency to carry out its mission.
- \*04 Positions requiring employees to live together, where employees are presently males, and where despite the good-faith efforts of the employing department, it is not yet possible to provide separate quarters for females.
- \*05 For other circumstances which, in the opinion of the appointing power, require appointment of a male only, appointment of a male only may be authorized by the Personnel Board Departmental Employment Service analyst upon approval of the Personnel Board Departmental Employment Services section supervisor, if sufficiently justified by concerns for equity and essential program objectives.
- 06 Work in which female's right to privacy would be violated by the presence of a male.
- 07 Casework in which the treatment needs of those served require a female caseworker, or positions in an institution where employment of a male would result in antisocial or violent behavior by the patients, wards, or inmates.

(continued on next page)

# ITEM 951 - APPOINTMENT RESTRICTION - SPECIFIC SEX (CONT.)

## CODES DEFINED: (Cont.)

- 08 Law enforcement positions in which the employment of females only is shown to be essential in order to maintain public confidence in the ability of the agency to carry out its mission.
- \*09 Positions requiring employees to live together, where all employees are presently female, and despite the good-faith efforts of the employing department, it is not yet possible to provide separate quarters for males.
- \*10 For other circumstances which, in the opinion of the appointing power, require appointment of a female only, appointment of a female only may be authorized by the Personnel Board Departmental Employment Services analyst upon approval of the Personnel Board Departmental Employment Services section supervisor, if sufficiently justified by concerns for equity and essential program objectives.
- \* Need SPB Approval Date (mm/dd/yy).

# 2.142 (Rev. 08/91)

## ITEM 952 - CASE NO. AND DATE OF ACTION

DESCRIPTION:

When a change or modification of a previous action occurs

due to employee appeal to SPB or because of a court

decision, the SPB Case No. and date or the Court Order No.

and date must always accompany the new transaction.

REQUIRED:

When a transaction is being documented/voided as the

result of SPB or court action. See PAM Section 5 -

Documenting Decision of SPB After Appeal.

LENGTH:

15 characters

ENTER:

952: Case number\* (6 digits) - date (mm/dd/yy)

. Case NO. of SPB Action or Court Order NO. - DATE of

SPB Action or Court Order

. Court action but no Case No. enter: ØØØØØØ - Date

(mm/dd/yy)

\* Use leading zeros when the Case/Court Order number is

less than six digits.

ADDITIONAL

INFORMATION:

This item may be entered more than once on the PAR.

	FROM:		* *,					:
ال		952	0059	706 -	09/03/8	14		
	TO:	105			77		210	

# 2.143 (Revised 11/12)

### DESCRIPTION:

Used to report multiple hourly rates for those employees who are paid more than one and up to five rates of pay. These rates have alpha characters preceding them to distinguish each rate. The rate in Item 320 is assumed to be Rate A. Rates entered on Line 8/9 should be accompanied by the alpha characters B, C, D and E.

### REQUIRED:

- 1) For appointment transactions when an employee is appointed to:
  - Trade Rate Classes with more than one rate of pay; or
  - Printing Rate Classes at the State Printing Plant.
    OR
- When information in the shaded area is blank, changing, or no longer applies.

# LENGTH:

ENTER:

955: B - Rate (5 characters) - C - Rate (5 characters)
D - Rate (5 characters) - E - Rate (5 characters)

\*EOF - information no longer applies to employee's current status.

# ADDITIONAL INFORMATION:

This item will turnaround on the PAR in Line 8/9 area for future reference. Refer to PAM page 2.100 for additional information.

To change one or more multiple hourly rates, submit an MHR Transaction, reenter <u>all</u> rates that are still valid (for turnaround purposes).

When hourly rate exceeds \$99.99, document rate in Remarks, Item 215, using the format referenced above, e.g., 955: B – 102.15.

When an employee separates, alpha characters must be used when completing Items 606 and 607 to identify the rate(s) at which time is to be paid. See Items 606 and 607 for further explanation of usage in these instances.

TO:	955	B - 13.58 - C - 14.61	
	905	D - 14.83 - E - 14.93	21/

9	FROM:	955	B - 13.58 C - 14.61 D - 14.83 E - 14.93
	TO:	955	*EOF

### ITEM 957 - OTHER ELIGIBILITY SUBSTANTIATION

# **DESCRIPTION:**

#### Identifies:

- 1) Eligibility necessary for certain types of permissive and mandatory reinstatements.
- Eligibility necessary for demotion or transfer with or without examination.
- Qualification for payment of leave credits under certain conditions.
- 4) Reason for termination of C.E.A. Appointment upon reinstatement or transfer.
- 5) Eligibility for or termination of certain types of disability benefits.
- 6) An Illegal Appointment under G.C. 19257.5 (Personnel Operations Use Only).
- 7) Seasonal classification appointment justification.
- 8) Involuntary Leave.

ENTER:

957: Code - Class Code - Agency Code - Name and/or Date(s), or Reason Code as indicated below:

### REQUIRED:

For A02 Transaction when employee has no prior qualifying service in the new class (except for tenure E or R). Use one of the codes 1 through 8 that apply.

Code 2 applies for permissive reinstatements when using a class in which employee served but is not in the employee's employment history record on the Data Base.

### CODES DEFINED:

- Employee Certification of ability to type is available upon request of Personnel Operations.
- 02 Class Code upon which appointment eligibility is based. Enter class code.
- Use of prior service eligibility.
   Enter <u>class code</u> of service and <u>date</u> SPB analyst approved eligibility.
- O4 Employee possesses specific educational and/or experience qualifications. Enter <u>date</u> SPB approved qualifications.
- Employee qualified in the written portion of the examination. Enter class code and date for which written exam was taken.

(continued on next page)

# 2.145 (Rev. 05/96)

# ITEM 957 - OTHER ELIGIBILITY SUBSTANTIATION (cont.)

	* ×
REQUIRED:	CODES DEFINED:
Requirements continued from previous page.	06 - Use of abolished list. Enter <u>date</u> SPB analyst approved list to be abolished; <u>date</u> of list and <u>date</u> list was abolished.
	07 - List eligibility in the same or a related class. Enter <u>class code</u> and <u>date</u> of list.
	08 - Scheduled written examination. Enter exam <u>date</u> .
For permissive reinstatement following a S41 (Dismissal).	09 - Approval for reinstatement granted in SPB memo. Enter <u>date</u> of memo.
For any appointment of CEA employee to a CEA or non-CEA position. Use one of the codes 10	10 - Termination of this Career Executive Appointment at the request of appointing power; performance was satisfactory.
through 12 that apply.	11 - Termination of this Career Executive Appointment at the request of appointing power; performance was <u>not</u> satisfactory.
	12 - Termination of this Career Executive Appointment at the request of employee; or promotion, transfer, etc., where the intent is to accept another position rather than to terminate the Career Executive Appointment.
For a 565 transaction when an employee is eligible for Enhanced Industrial Disability Leave (Enhanced IDL).  OR  For a 565 transaction when an eligible employee has elected Industrial Disability Leave with Supplementation (IDL/S).	<ul> <li>13 - Enter the appropriate code as follows:</li> <li>A - Employee is eligible for Enhanced IDL benefits.</li> <li>B - Employee has elected IDL/S.</li> <li>C - Not in use at this time.</li> <li>D - Not in use at this time.</li> </ul>
For A03 Transaction (Mandatory Reinstatement); or S01 Transaction (Resignation W/O Fault - Voluntary) Following an S55 Transaction (Special Leave - Technical Cooperation Program).	14 - Employee's service in technical cooperation program was terminated. Enter date terminated.

# ITEM 957 - OTHER ELIGIBILITY SUBSTANTIATION (cont.)

REQUIRED:	CODE	ES DEFINED:
When a mandatory reinstatement requested within time limit, but reinstatement occurs at a later date.	15 -	Employee's request for reinstatement was made. Enter <u>date</u> of request.
For S57 Transaction when taking employee off pay status due to involuntary leave. Has exhausted benefit programs or leave credits or elects not to use benefit programs or leave credits.	19 -	Employee off pay status pending disabilit retirement.
For payment of leave credits while on statutory exempt appointment.	20 -	Reinstatement for payment of lump sum credits.
For all TRANSFERS without examination. This includes transfers in the same class.	21 -	Transfer without exam.
When reporting an A02, A03, A12, A30, A32, 405, 565 or SPC Transaction and employee's NDI benefits are beginning or continuing.	22 -	Employee is eligible for NDI benefits but is not on NDI Leave.
When reporting 565 or SPC Transaction and employee's NDI benefits are terminated.	23 -	Employee's NDI benefits terminate on date of this action.
For Personnel Operations use only - Used when correcting an illegal appointment.	24 -	Illegal Appointment under G.C. 19257.5.

# ITEM 957 - OTHER ELIGIBILITY SUBSTANTIATION (cont.)

REQUIRED:	CODES DEFINED:
REQUIRED:  For A01 and A02 Appointments to seasonal or entry level non-testing classifications requiring priority hiring consideration to persons under the CalWORKs Program, per Government Code Sections 19063 - 19063.8.	<ul> <li>CODES DEFINED:</li> <li>25 - Enter the appropriate reason code as follows:</li> <li>A - Employee was employed in THIS class during the prior 12 months and is NOT under the CalWORKs Program.</li> <li>B - Employee was employed in this class during the prior 12 months and is under the CalWORKs Program.</li> <li>C - Employee was NOT employed in this class during the prior 12 months and is under the CalWORKs Program.</li> <li>D - Employee was NOT employed in this class during the prior 12 months and is NOT under the CalWORKs Program.</li> <li>1 - Affirmative Action hire</li> <li>2 - Approved emergency appointment</li> <li>3 - No CalWORKs Program referrals from EDD</li> <li>4 - No qualified CalWORKs Program</li> </ul>
	5 - CalWORKs Program did not show 6 - CalWORKs Program refused job

9	TO:	957	21	
		905		910
<u>D</u> .	то:	957	25-C	910
] @	FROM:			710
-	TO:	957 905	25-D-3	910

#### 2.147 (Rev. 03/84)

# ITEM 958 - SEPARATION TIME TO BE PAID SUBSTANTIATION

DESCRIPTION:

This item is used in coordination with Item 607 - Time to be Paid (Old), on the PAR and when Item 615 - Immediate Pay, is checked. Item 958 must show the position number employee was in previous to his current position number when he occupied two different positions during the pay period of effective date. Item 607 - Time to be Paid (Old), will indicate days and hours to be paid from his previous position.

REQUIRED:

For any separation transaction where an employee occupied two positions in the same pay period and immediate pay is

requested for both positions.

LENGTH:

16 characters

ENTER:

958: Agency code-R.U. code-class code-serial no. code

	FROM:		( v		Q **	10	
			ļ		·		
1	TO:	958	789-10	00-5392	- 701		
1	10:	905					910

## 2.148 (Rev. 02/76)

# ITEM 960 - CORRECTED TRANSACTION IDENTIFIER

DESCRIPTION:

For correcting or voiding a transaction, this item

identifies the position number of the original transaction being corrected or voided. This information on the PAR enables the computer to locate the original transaction.

REQUIRED:

When correcting or voiding a transaction.

LENGTH:

16 characters

ENTER:

960: position number

EXAMPLE:

FROM:			
TO:	960	711 - 013 - 1128 - 003	- 2
	905	A	910

outs of the rest outside the following and areas follows:

# 2.149 (Rev. 08/96)

## ITEM 962 - SEPARATION PAY AT ALTERNATE SALARY RATE

DESCRIPTION: This item is used to request an alternate rate of payment for all or

part of separation pay. It includes regular, lump sum vacation,

overtime and sick leave (subject to G.C. 19991.4).

REQUIRED: Separation transa

Separation transaction when rate of pay is different than shown in Salary Total (Item 306). Use only for one of the following conditions:

1) Change in fire mission status.

2) SISA (see PTM Sections 133.8-133.81) or MSA occurring during period of lump sum payment. This should only be used if employee would not be eligible for the SISA/MSA rate upon reinstatement (as defined in DPA Rule 599.687 and PTM Section 623). Also complete Item 872.

3) 10/12 pay plan employee due lump sum payment.

4) Changes to premium pay rates as stipulated by Collective Bargaining contracts.

5) Item 350 (Special Pay) and/or Item 351 (Established Earnings) reflects a premium pay that is not eligible for inclusion in separation lump sum payment.

 Reallocation or split-off occurring during the period of the lump sum payment and the reallocation/split-off involves a

change in salary rate.

LENGTH: 19 characters (includes decimals and dashes)

ENTER: 962: Salary Total - Code - Days - Hours - Tenths of Hours

ENTRIES

DEFINED:

Salary Total: (8 digits) Enter the new rate. When the salary total is less than 8 digits, leading zeros must be entered.

Rate should include any special pay\*, plus salary, shift differential. Entry must be in the same format

as Item 306 to reflect the appropriate time base.

\* <u>DO NOT INCLUDE</u> any special pay (reflecting in PAR Data Item 350) that is not eligible for inclusion in separation lump sum payment.

<u>Code</u>: (1 digit) Enter the code for the first type of salary payment due at the new rate (e.g., if code 2 is entered, all vacation, overtime and sick leave will be

paid at the new rate - see example).

(continued on ----

# 2.149.1 (Rev. 11/06)

# ITEM 962 - SEPARATION PAY AT ALTERNATE SALARY RATE (cont.)

# ENTRIES DEFINED (cont.):

Code 1 - Regular Time

Code 2 - Vacation

Code 3 - Overtime / Extra Hours

Code 4 - Sick Leave (subject to G.C. 19991.4)

# Days, Hours, Tenths of Hours:

Days (2 digits), Hours (3 digits), Tenths (1 digit). Enter time to be paid at the new rate for the <u>code selected only</u> (e.g., if employee is entitled to 3 days of vacation and 2 days of overtime at the new rate, enter 3 days – see example A.

If the total time to be paid for the code selected is greater than 99 days, enter 99 in the Item 962 days field. Convert the remaining days beyond 99 to hours, add to any other hours to be paid, and enter the resulting value in the Item 962 hours field.

If employee is entitled to 124 days, 4 hours vacation and 4 days of overtime, enter 99 days and 204.0 hours - see example B.

### **EXAMPLE A:**

	FROM:			
9		962	02950.00 - 2 - 03 - 000.0	
	TO:	905		810

### **EXAMPLE B:**

	FROM:			
9		962	01950.00-2-99-204.0	
	TO:	305		910

# ITEM 964 - MILITARY SERVICE DATES

(Rev. 06/82)

**DESCRIPTION**: This item is used to report dates of all full-time active military duty served. The employee's state and military services are combined to qualify employee for 30 calendar days military leave pay. See PTM Sections 471 and 48I.13.

REQUIRED: For Transaction Code S51 (Military - Short Term) when employee does not have one year of continuous State service.

LENGTH: 15 characters

ENTER: 964: mm/dd/yy - mm/dd/yy

ADDITIONAL INFORMATION: Item 964 may be entered more than once, if

necessary.

**EXAMPLE**:

	FROM:			1	28	(4	**	12	1
				- 0				ř.*t	
90	TO:	964	03/0	1/73	} -	- 0	1/08/	75	
		905					- 6		

( No Break in military service)

	FROM:			12	
£	TO:	964	05/10-/77 ~ 05/09/79	964	06/03/80 ~ 06/02/82
		905		910	

(Break in military service)

# PAR ITEMS - LINES 8 AND 9

### ITEM 999 - DEDUCTION INFORMATION

(Rev. 09/03)

**DESCRIPTION**: Indicates one time payroll deductions are to be made from a PAR transaction requesting payment.

### REQUIRED:

- 1 For Appointment and Separation transactions requesting immediate payment and a Payroll document effective the <u>same pay period</u> is submitted for one of the following deductions:
  - Accounts Receivable
  - Tax Sheltered Annuity
  - Union Benefit Trust Fund
  - Deferred Compensation
  - Variable Maintenance
- 2 For Separation transactions when requesting Deferred Compensation, Tax Sheltered Annuity or PST retirement be deducted from lump sum pay.

LENGTH: 13 characters

ENTER: 999: See Remarks

### ADDITIONAL INFORMATION:

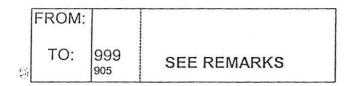
- Employees separating under Labor Code Section 201 or 202 must submit a written election five days before her/his final day of employment authorizing the deduction(s) from her/his lump sum pay.
- The applicable deduction information should be shown in Line 10, refer to page 2.201.
- Deferred Compensation, Tax Sheltered Annuity or PST retirement deduction information in Line 10 should include deduction codes, amounts & pay periods affected. Sample of Line 10 entry:
- Deduct Deferred Compensation from 06/97, 07/97, and 08/97 Lump Sum Payment:

029 - 001 \$100.00 029 - 003 \$150.00

029 - 003 \$150.00

 Deductions requested per the PAR Item 999 process must be manually coded and processed through the payroll system prior to the PAR being keyed to the data base. This can take from three to eight working days.

### **EXAMPLE**:



NOTE: These transactions must be submitted to PPSD for processing or arrangements made with payroll, to establish deductions prior to keying separation transactions.